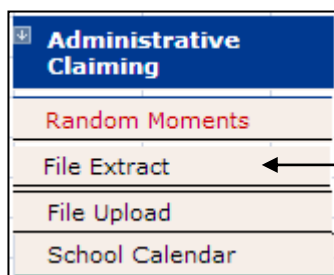## Uploading RMTS Participants - Quarterly

This guide will describe how to extract the RMTS participant list file from the system, create an upload file and then upload that file into the system. This must be completed on a quarterly basis.

Extracting Files

> *Summer 2014 Special Instructions* This is your first RMTS quarter; therefore there is no participant data in the system. Follow the process below and use the extract format as a template to populate your RMTS participants.

When you extract a file from the system it will give you a list of all the active time study participants from the quarter you want to upload. For example, you will pull the extract for 2nd Q FY 15 because that is the quarter you want to upload your file into. You will update the file to reflect any changes you need to make for 2nd Q FY 15.

Step 1: Under "Administrative Claiming" on the left navigation menu, select "File Extract."

Step 2: Your School District should pre-populate (if you are a vendor, you will see all the schools you manage), use the drop down arrow and select "Year" and "Quarter." An Excel file containing the RMTS participants will download. Remember to choose the Year and Quarter in the future that you will be working on. Year is 'fiscal year' not calendar year, so the quarter 10/1/14 – 12/31/14 is the Second Quarter of Fiscal Year 2015.

Step 3: Click "Submit." The file containing your school district's RMTS participants will download to your computer. You may directly open the file or you may save it in Excel on your computer. NOTE: **Summer 2014 only**: this file will have the template headings only (no data).

Creating Upload Files

Use the extracted file as a template which you need to update with any changes for the next quarter. It is important that all the necessary data elements are completely filled in for each participant. If you are adding a new participant that has never been in the system, you can either assign them a 'true' Employee ID, if you use them, or you can leave the Employee ID blank (column A) and the system will assign one. Anyone who will not participate in the next time study should simply be removed from the file. When you are adding job descriptions, use the "CT-SBCH Job Descriptions" handout. Copy/paste the titles into the RMTS participant file. This will ensure proper spacing and accuracy.

Employee	Last Name	First Name	Email Address	Job Description	Active Y or N	Fed Fund %	School/Group	Supervisor Email #1	Supervisor Email #2
	Daffodil	Dana	daffodil@email.test	Medicaid Coordinator/Clerk	Y	0	Group 1	super2@email.test	
	Daisy	Darla	daisy@email.test	School Counselor, Admin only	Y	0	Group 2	super1@email.test	mikey@email.test
	Pansy	Patty	pansy@email.test	School Nurse	Y	0	Group 3	super1@email.test	
	Sunflower	Robin	Sunflower@email.test	Nurse (LPN), Claiming	Y	0	Group 1	super2@email.test	

Once all the changes have been made, save the file to your computer. When saving the file you MUST use the following naming convention so that it can be uploaded into the system: *HP_TS_State_SD PROVIDER NUMBER_Qtr_Year_ file#*.xls

Example Decoded:
The file in the above example is for HP (health personnel), for the TS (time study) _ in CT-SBCH_ with a Provider number of 001123456 (for the ABC School District) _ for the 2nd quarter _ 2015_01 (first upload). Below is how it should be saved for proper upload:
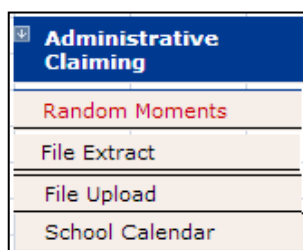
HP_TS_CT-SBCH_001123456_2_2015_01.xls

You must include the underscore spaces, 01 (for the first upload) and xls.

Uploading Files

Files must be uploaded approximately 20 days prior to the start of each quarter, even if you have no changes from the current quarter. This enables UMMS to track and ensure the participant data for the entire state is ready to go for quarterly moment generation.
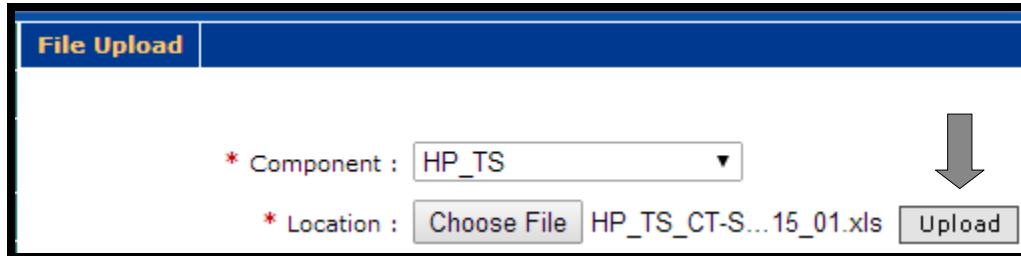
Step 1:   Under the "Administrative Claiming" on the left navigation menu, select "File Upload."

Step 2:   The "Component" will pre-populate to 'HP_TS'.
Click "Choose File" to find the file you worked on. Select the file, and then click "Open." *Your file will show next to the "Choose File" button, as seen in the example below.*

Note: The file must follow the naming convention described on the previous page.
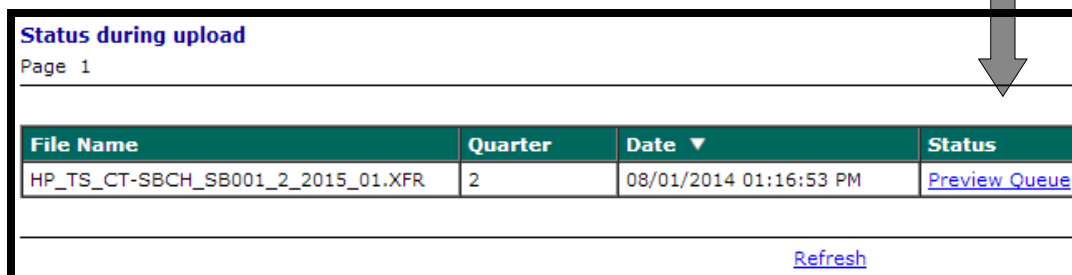

Step 3: Click "Upload." The file will show up on the list of files on the bottom section of the screen. The upload process takes a little bit of time, so you may click "Refresh" after a few minutes for the file status to change.
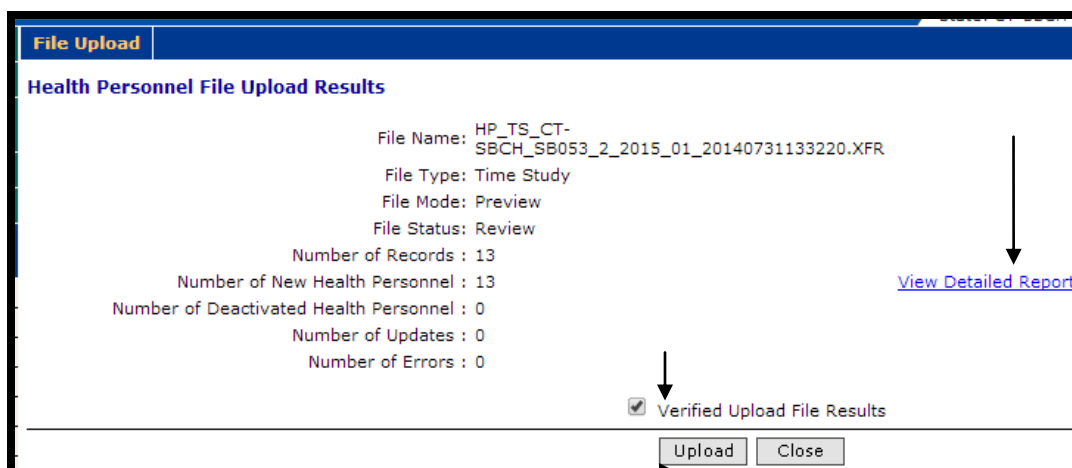

Step 4: When the status changes from "Preview Queue" to "Review", click on "Review". This will open up the Health Personnel File Upload Results. Click on the active link(s) called "Viewed Detailed Report." Each report will give you details on the file you uploaded. See an example below.
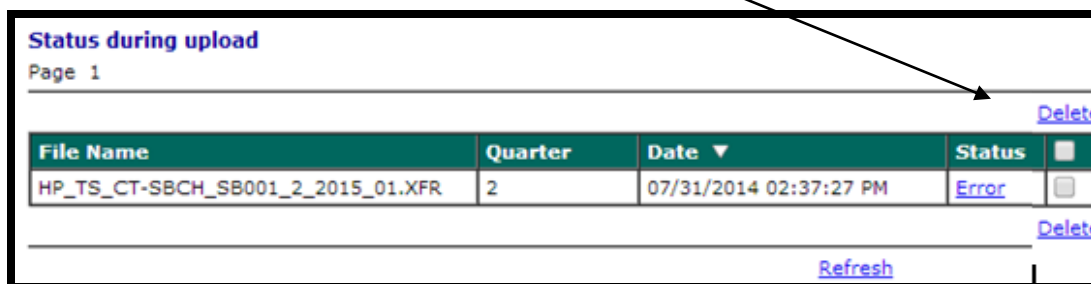

Step 5: Review all the reports that have a "View Detailed Report" link. This may include the New Health Personnel, Deactivated Health Personnel, Updates and Error reports. Once all data has been verified to be correct, check the "Verified Upload File Results" box and upload the file.

Note: To confirm you are ready to upload the file, you must click the box in front of the 'Verified Upload File Results.' If any file is not uploaded this will exclude your staff from being part of the RMTS pool of participants. Participants who are NOT listed on the upload file will be deactivated for the upcoming quarter.

Step 6: When the file is submitted and uploaded, the status will change to "Successful" when completed. At this point, all changes and additions will be made in the system. You may review the detailed reports at any time by clicking "Successful" and "View Detailed Report."

Note: If the file 'Errors', click on the Error link. The report will show you the issues that caused the file to fail. You must fix the problems in the file that caused it to error. Then delete the Error file by checking the box under "Delete." Then start the upload process again.
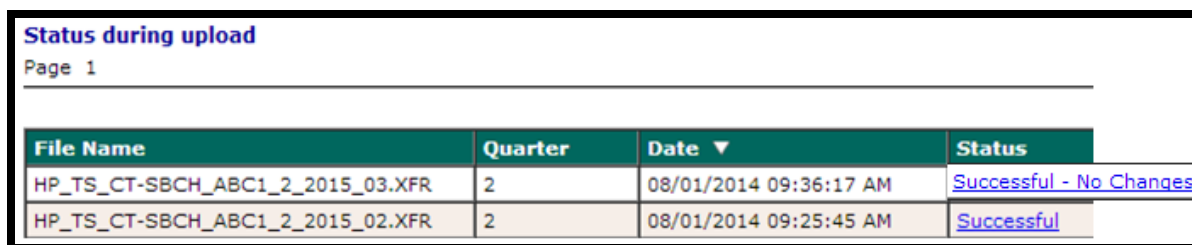
Status during upload
Page 1

File Name	Quarter	Date ▼	Status	☐
HP_TS_CT-SBCH_SB001_2_2015_01.XFR	2	07/31/2014 02:37:27 PM	Error	☐

Delete

Delete

Refresh

Note: Remember, you must upload the file, even if there are no changes. Any files that are uploaded that have no changes will read "Successful – no changes". If a file has been uploaded and you wish to make changes after it has been uploaded, refer to the naming convention rules on page 2.

Status during upload
Page 1

File Name	Quarter	Date ▼	Status
HP_TS_CT-SBCH_ABC1_2_2015_03.XFR	2	08/01/2014 09:36:17 AM	Successful - No Changes
HP_TS_CT-SBCH_ABC1_2_2015_02.XFR	2	08/01/2014 09:25:45 AM	Successful

Helpful Tip: When you have completed your upload and your file status says 'Successful,' return to the 'File Extract' page and download a new list of your RMTS participants. This file should now exactly match your upload file, including removal of any staff, addition of new staff and changes to existing staff information.

Please call 800-535-6741 or email UMASS if you are having any trouble uploading the file.
Schoolbasedclaiming@umassmed.edu